Program Reporting Requirements for *Earn*Benefits Community Partners

As stated in the *Earn*Benefits contractual agreement, each community partner is required to submit monthly program reports to Seedco on its *Earn*Benefits activities for the previous month. While screening, facilitated access, benefit enrollment and follow-up activities can be documented in *Earn*Benefits Online (EBO), outreach or information and education activities cannot be tracked in the same way. In order to assist CBO partners in reporting their activity in these areas, we have developed two important tools: the Outreach Tracking Log and the *Earn*Benefits Sign-In Sheet. Each tool is described below.

Outreach Tracking Log

Each month, EB primary contacts will be required to **submit an Outreach Tracking Log** for their site's activities. **Logs are due via e-mail to Rebekah Morris at rmorris@seedco.org by the 2nd business day of each month for the previous month** (e.g., the log is due on June 2nd for activities performed in May). A hard copy of the Outreach Tracking Log is also included in the training binder for your reference. This deadline is set so that Seedco can collect the data and include it in monthly performance snapshots that reflect each community partner's progress toward achieving targets. Performance snapshots will be sent to primary contacts by the 10th of each month.

The Outreach Tracking Log includes a list of various outreach strategies that might be performed at each site. *Earn*Benefits staff should complete a log each month, reflecting the number of people reached through each activity. Capturing exact outreach information is often challenging (for example, if you send 100 mailings to former clients, a number of them may eventually be returned), but community partners are encouraged to report as accurately as possible. If there is a listed strategy that has not been employed at the site during a particular month, "no activity" should be entered in the Numbers column. If there is an additional strategy that was employed during the month, you should briefly describe the activity in the "Other" category and include a count of those individuals reached through this method.

In the last row of the log, community partners will record the total number of clients who expressed an interest in learning more about *Earn*Benefits and/or being screened during the month, but who were never actually entered in EBO.

*Earn*Benefits Sign-in Sheet

The *Earn*Benefits Sign-in Sheet should be used in conjunction with the Outreach Tracking Log to capture contact information for clients who have received some information about *Earn*Benefits and are interested in receiving additional information and/or being screened. Each *Earn*Benefits staff should keep a separate sign-in sheet.

To use this tool:

1. As clients respond to outreach activities and express an interest in learning more about *Earn*Benefits and/or being screened, record their name and contact information on the Sign-in Sheet;
2. Be sure to check off in the far right column of the sheet whether or not a client is actually screened in EBO;
3. At the end of each month, tally the number of clients listed who have NOT been screened;
4. Include this tally on the Outreach Tracker Log in the appropriate column;
5. Follow-up with clients who have not been screened during the month to gauge their interest in being screened.

Community partners are not required to submit the Sign-in Sheet and Seedco will not collect individual client data for pre-screening activities.

EarnBenefits Sign-In Sheet

If you are interested in being screened for benefits, please sign-in below…

DATE	NAME	CONTACT INFO (Address, Phone, Email)	(for office use only) SCREENED

Earn Benefits Outreach Tracking Log

Community Partner:
Month:
Prepared By:

Activities	Number
1. # of individuals sent mailings	
2. # of individuals given flyers (e.g. in cubbies, sent home with children)	
3. # of presentations conducted that included *Earn* Benefits information (e.g. parents conferences, events, other meetings where *Earn* Benefits was not the main topic)	
4. # of people who attended these presentations	
5. # of workshops held specifically to inform clients about *Earn* Benefits	
6. # of people who attended the *Earn* Benefits workshops	
7. # of Financial Education workshops	
8. # of people that attended Financial Education workshops	
OUTREACH TOTAL (bolded figures)	
# of Clients for whom info was collected, but who were not screened (include the total number from all sign-in sheets)	

** Outreach total equals the sum of rows 1,2,4,6&8*